

Documentation Tips for Ops & Tech Colleagues

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Introduction

Effective documentation increases efficiency and productivity, improves consistency, quality and process control, and ensures compliance with regulations. Associated Bank’s [Brand, Style and Copy Guides](#) provide detailed content regarding communication standards used by the bank. The IT Program technical writer has also created detailed standards and templates for writing information technology policies, standard, procedures, etc. This document highlights small changes that if implemented will improve documentation created while maintaining Associated Bank and Information Technology documentation standards.

Tips for Effective and Concise Documentation

- Use Active vs. Passive Voice (the noun is performing [verb] the action vs. the noun receives the action); refer to [Common Action Words](#) section.
 - Passive: “The document will be saved when you press OK.”
 - Active: “Click Ok to save the documentation.”
 - Passive: “A file will be created.”
 - Active: “Create file.”
- Use present simple tense (the action by a user is being completed now, not in the future).

Note: Only use future tense if something is truly happening in the future.

 - Future: “Signature will prompt you to verify the deletion.”
 - Present: “Signature prompts you to verify deletion.” or “Signature prompts verification of deletion.”
 - Future: “You will need to complete this task before moving to the next step.”
 - Present: “Complete this task before moving to the next step.”
- Write in Second Person if needed (these are the “You” pronouns and refer to the audience).

Note: Since this is technical documentation, try not to use Third Person pronouns (e.g., she, he, they), unless absolutely necessary for clarity. Writing in Second Person is gender-neutral.

 - No: “If you need to use point-of-view, write in second person.”
 - Acceptable (contains “You” but is an active sentence): “Write in second-person if you must use point-of-view.”
 - Yes (Re-written to not use “You”): “Write in second person when point-of-view is needed”

4. Remove all unnecessary words (e.g., This, That, On, These, It, The, Please, Thank you).
 - No: “The Alt key that is located on the bottom of your keyboard needs to be pressed.”
 - Yes: “Press Alt key located at the bottom of keyboard.”
 - No: “Click on the OK button when the message window appear on your screen.”
 - Yes: “A message window appears; click OK.”
 - No: “Please open the following Excel file.”
 - Yes: “Open the following Excel file.” or “Open Excel file.”
 - No: “Thank you for reading this documentation and adhering to the established process.”
 - Yes: *Revise the above sentence to an active statement without the pleasantries or delete if it adds no value to the documentation.*
5. Avoid contractions in technical/professional documentation.
 - No: Don’t
 - Yes: Do not

Brand Guide Highlights

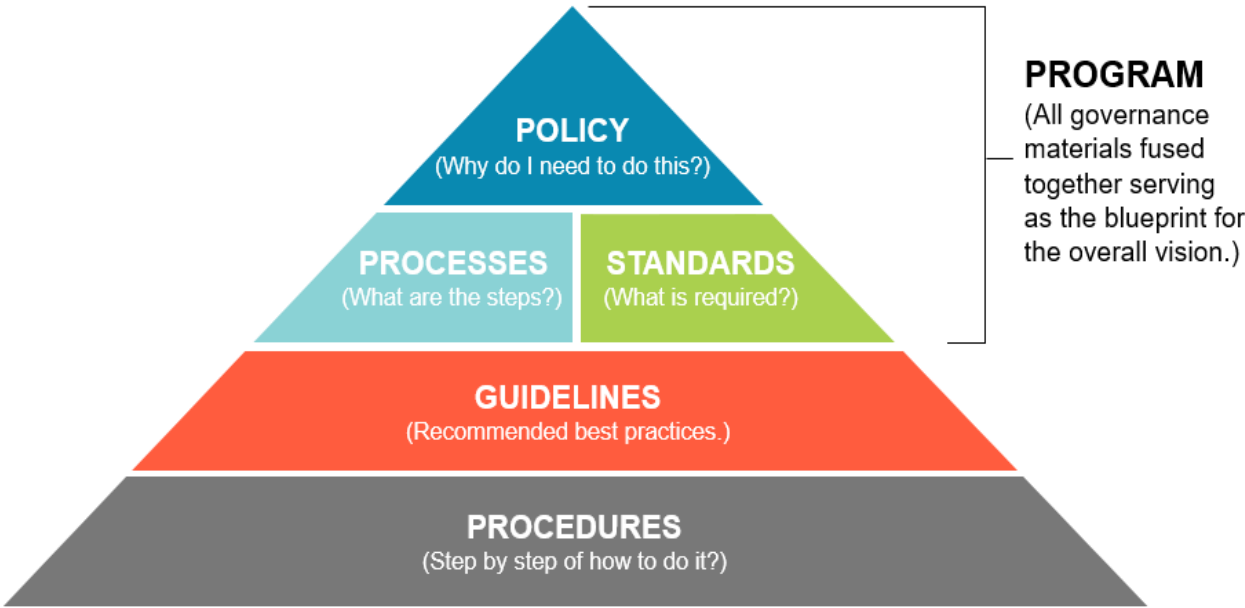
Our corporate brand represents who we are to our customers, communities, shareholders and each other. It is important that all colleagues understand our standards and guidelines to ensure Associated Bank’s brand is represented in a consistent, positive manner. The Marketing Resources webpage contains the bank’s [Brand, Style and Copy Guides](#). Below are a sample of brand standards that are applicable to Information Technology. This list is not all-inclusive; refer to the Marketing Resources page for additional brand standards.

1. Acronyms and Abbreviations: ***Never assume your audience understands an acronym.*** Always spell out the name the first time it is mentioned (e.g., The Systems Analyst (SA) completed the upgrade; then the SA updated documentation.).
2. Simple Bulleted List: No period after each item.
3. Longer Bulleted List: Add period if a complete sentence. If not a complete sentence, no period.
4. The bank follows the APA Style Guide and does not use the “Oxford Comma” which is last comma in a simple series. Only use the Oxford comma if needed for clarity.
 - Correct: “They deposited a check, some cash and assorted change.”
 - Incorrect per APA: “They deposited a check, some cash, and assorted change.”
5. Per APA, enter one space after a period.
6. Use “noon” for 12 p.m.
7. Use “a.m.” and “p.m.” for time, not “AM or PM.”
8. No :00 after even-hour time. (8 a.m. is correct. 8:00 a.m. is incorrect).
9. Do not reference Daylight Saving Time (e.g., use CT instead of CST).
10. “Third-party” is spelled with a hyphen.
11. “Username” is one word.

- 12. Unless it starts a sentence, “user ID” is correct.
- 13. Use “and” instead of “&”.
- 14. Unless specifically dictated by a process, spell out numbers one-nine, numeric for 10 and up. Spell out any number that starts a sentence.
- 15. Not mentioned in the brand guide, but very important when documenting: Scrub images for customer or colleague details. Crop or blur image to remove confidential/private information.

Document Type Definitions

There are multiple types of documents that together create the IT Program. To ensure consistency, the following document types have been defined. Each document type provides a real-world and an information technology-related example.



Document Type	Definition
Policies	<ul style="list-style-type: none"> • An established rule or formal statement of intent. It answers why something should be done. <ul style="list-style-type: none"> ○ All policies must be approved by the Board of Directors. Sub-policies do not have to be approved by the Board. • <i>Real-world example: A policy written that requires at minimum a standard Thanksgiving dinner be made for the immediate family.)</i> • <i>Information Technology example: A policy written that all system testing is completed by Quality Assurance or that all purchases must go through the Vendor Management Office.</i>
Standards	<ul style="list-style-type: none"> • A required or agreed level of quality of attainment. Provides the benchmark for quality or performance. • <i>Real-world example: A standard Thanksgiving meal will contain turkey, stuffing, potatoes, gravy, cranberry sauce and pie</i> • <i>Information Technology example: A standard for password naming conventions or for formatting conventions for documentation</i>

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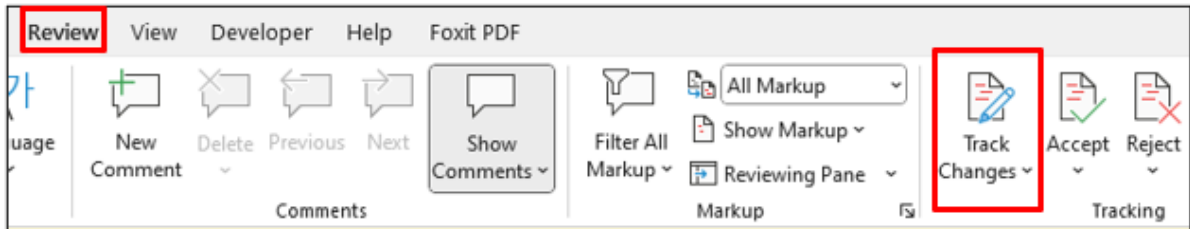
Document Type	Definitions
Process	<p>Definitions</p> <ul style="list-style-type: none"> • Strategic framework that outlines the steps needed to achieve a goal; a broad description of what needs to be completed • Higher-level than a procedure, which develop from processes • <i>Real-world example: Thanksgiving Food Preparation.</i> • <i>Information Technology example: New Branch Opening Process, IT Program Department Overview, Quality Assurance Project Testing Process</i>
	<p>Naming Standards</p> <ul style="list-style-type: none"> • A <i>Process Overview</i> is created for information not granular enough to be a procedure, but not high-level enough to be policy • A <i>Department Overview and Strategies</i> document is a high-level summary with or without goals (strategy) for a specific business unit
Procedure	<ul style="list-style-type: none"> • Collection of actions to complete a step in a process; the “How to” • <i>Real-world example: How to set the table, how to cook the turkey, how to make mash potatoes, etc.</i> • <i>Information Technology example: How to reset a network password, how to submit a service request, etc.</i>
Guidelines	<ul style="list-style-type: none"> • General guidance and additional advice/support. Should not be mistaken for a process. • <i>Real-world example: Make a shopping list, shop early, etc.</i> • <i>Information Technology example: Naming suggestions for proper password management (e.g., never use user name in password, avoid personal names as password, change password immediately when notified, etc.)</i>
Templates	<ul style="list-style-type: none"> • Document with a standard layout that allows users to reuse the standard rather than create a new document or form every time • RACIs fall under templates • <i>Real-world and Information Technology example: a checklist or form that can be used year after year</i>

Track Changes in Microsoft Word

The following are basic instructions for using Track Changes in Microsoft Word and adding a comment to a document.

Turn On/Off

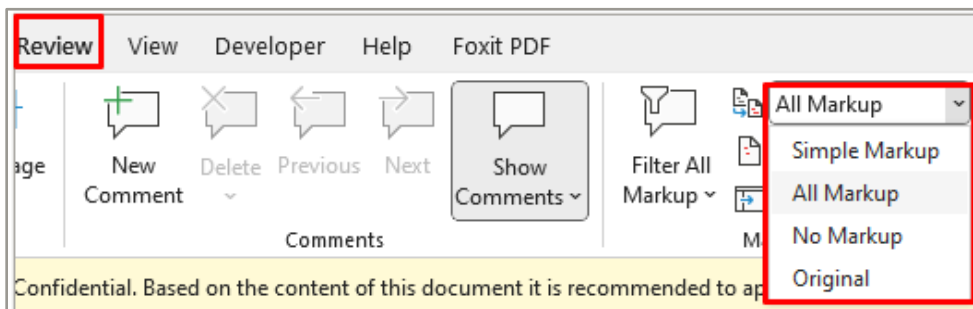
1. Open a document in Microsoft Word.
2. Select *Review* from the top menu > *Track Changes* under Tracking menu.



- When Track Changes is highlighted, Track Changes is on.
 - Deletions are marked with a **strike-through**
 - Additions are marked with an **underline**.
- When Track Changes is not highlighted, Word stops marking changes; however, prior strike-throughs remain in place.

Options to View Track Changes

1. Open a document in Microsoft Word.
2. Select *Review* from the top menu > *All Markup* under Markup menu.



- Select one of the following options:
 - Simple Markup: Displays tracked changes with a red line in the left margin
 - All Markup: Displays all tracked changes and comments
 - No Markup: Hides the markup to show a clean version of the text
 - Original: Displays the original document without tracked changes and any comments. However, any tracked changes or comments no accepted, rejected or deleted remain in the document.

Add a Comment

1. Open a document in Microsoft Word.
2. Select *Review* from the top menu > *New Comment* under Comments menus.
3. Enter basic comment, select Ctrl + Enter or the arrow to post.
4. To assign the comment to someone specific complete the following:
 - Enter “@”, select their name
 - If “Assign To” box is checked, it will assign a task that is emailed to be completed and close
OR
 - If “Assign To” not selected, the comment is emailed to them
 - Select Ctrl + Enter or the arrow to post comment

Delete a Comment

1. Select "...", then select *Resolve thread* or *Delete thread*.

Common Action Words

The following is a listing of commonly used action words defined by the IT Program Management technical writer to ensure a consistent voice when writing procedures. This is not an inclusive list, but it will cover most scenarios and help you to write active vs. passive procedures.

Action	Definition
Accept	Receive with approval
Acknowledge	Indicate receipt of or to recognize the authority or validity of
Change	Make different
Choose	Make a decision; Select from options
Click	Mouse action. Do not use "Click on", it is redundant.
Close	Bring to an end, to terminate or suspend operation
Compare	Examine to note similarities or differences
Complete	To make whole, to bring to an end, finish
Confirm	To establish the truth, accuracy and validity
Copy	Duplicate
Create	To cause something to come into being
Determine	To conclude or decide after reasoning or observation
Develop	Bring to a more advanced state
Email	Use as a verb when sending an email (e.g., "Email abc.com" vs. "Send an email to abc.com")
Enter	To put in or insert. This is also a key on a keyboard.
Ensure	To make sure or certain
Export	To save in format usable by another computer format
Follow	To conform or comply with
Format	Arrangement of data for input/output
Identify	To recognize
Implement	To fulfill, perform or carry out
Import	To bring into one software from another
Input	To enter data into a computer for processing; may also used in place of "Enter" if used twice in a sentence (e.g., Input 2 in Number field; press Enter.)
Launch	To start a computer program
Locate	To identify or discover
Log on	Connect or access a system, website, application. It is written as two words. The noun "logon" is used with referencing credentials (e.g., username).

Log in	Process of entering credentials (i.e., username and password)
Log off	To stop using a system by giving a particular instruction
Log out	To terminate connection with a computer or system
Navigate	To move from one part to another, to move or progress through something in a logical sequence
Notate	To note, mark or set down
Open	To give access to
Paste	To insert copied text or images into a file
Post	To place text, images, etc. on a website
Press	Keyboard action
Receive	To take possession of; to be delivered or brought to
Research	To make an extensive investigation into
Review	To view, to look at (or again)
Save	To copy (a file or data) into a storage medium
Search	To look through something carefully to find something that is lost
Select	Marking text, cells that will be subject to user action (e.g., Select cells C1-C15)
Send	To cause to be transmitted to a destination
Start	To begin
Stop	To end
Submit	To present for approval, consideration or decision
Update	To bring up-to-date by adding new information or making corrections
Validate	To confirm something is correct or supports a claim (e.g., validation tests that the software works as intended)
Verify	To confirm something is true, accurate or justified (e.g., verification checks that code meets requirements)

Version Control

Date	Version	Changed By	Department	Description of Changes
03/6/25	1.0	Cathleen Halsey	IT Program Management	New document